

Solicitation Number: 07-0009-01

Business Support Service for the Office of Naval Research's for Code 06

The statement of work, order information, proposal submission requirements, and evaluation information are set forth below. Proposals from holders of ONR Multiple Award Contracts (MATOC) for support services under CLIN 0009 – Business and Financial Support Services are due by 2:00 PM (local), 14 February 2007.

1.0 BACKGROUND

The Office of Naval Research (ONR) is a leader in discovery and invention (6.1), developmental research (6.2), and technology demonstration (6.3). See ONR website: www.onr.navy.mil. No research is conducted at ONR's headquarters; however, it funds research at various corporate, academic, and defense facilities.

As a result of a recent operational review, ONR has identified a requirement for the modeling and analysis of its current business processes to provide the analytical framework (enterprise architecture) for Navy ERP transition, implementation, IT capital planning, and general business process improvement in the near and far terms.

2.0 BASE PERIOD

2.1 Objective

The objective of this effort is to define and develop the base-line ("As-Is") and future ONR enterprise architectures (To-Be") requisite for business process improvement and Navy Enterprise Resource Planning (ERP) implementation. Pursuant to the ERP requirement, a gap fit analysis will be conducted.

2.2 Scope

This effort defines the base period that includes the task scoping for development of the ONR "As-Is and "To-Be" target enterprise architecture and gap fit analysis to support Navy ERP transition and implementation at ONR Headquarters and ONR Global.

The contractor shall meet regularly with the Corporate Executive Steering Group (COESG) during the EA scoping, development and implementation processes and gap fit analysis. The deliverable for this effort will be a comprehensive report consisting of the following: vision statement and strategic objectives; gap fit analysis; scoping process; problem definition (risk, cultural issues, etc.); data collection process; session minutes; graphics; together depicting the enterprise "As-Is" and "to-be" operational views (OV – 1, 2,3, 4, 5, 6a. 6b) where applicable.

Once the Enterprise Architecture Planning and Implementation (EAPI) report is approved by the Contracting Officer's Representative (COR), the contractor shall conduct a gap fit analysis of ONR enterprise business process as it relates to the implementation of the Navy ERP system at ONR. The Gap Fit methodology shall be segmented into two sections: (1) Preparation/Linkage (Gap Fit) and (2) Implementation & Sustenance. The contractor shall support ERP implementation to include legacy application shutdown planning and implementation to help the customers in knowing how to transfer the data to Navy ERP, provide training, and conduct risk identification. If the option is exercised, the contractor shall also be responsible for the overall successful ERP implementation and sustenance strategy and planning.

2.3 Technical Tasks/Requirements

The contractor shall perform the following tasks:

2.3.1 Defining the Architectures

The contractor shall conduct a gap fit analysis for transitioning to the Navy Enterprise Resource Planning (ERP) requirement. To apply the gap fit analysis, the contractor must define ONR's "As-Is" baseline and "To-Be" enterprise architecture (EA) segments relating to the corporate vision and Navy ERP requirements. Thus, the contractor shall, first, define and codify all of ONR's current business rules, processes and models, legacy IT technology, associated software applications, etc. that comprise the "As-Is" enterprise architecture.

The contractor shall work with the ONR enterprise architect, COESG and associated working/focus groups to define and develop the enterprise architectural framework's purpose, scope, development methodology and tool support, EA models/artifacts, EA governance, and project and program management. Moreover, the contractor shall assist in the EA framework's alignment to ONR's IT investment and acquisition strategies Capital Planning and Investment Control (CPIC), identifying EA team training and education requirements, definition of EA organizational culture influences that are critical success factor.

The contractor shall explicitly link the business context and direction to those IT functions required to support the business activities that support corporate objectives. The process of identifying, tracing, and linking these activities within an architectural framework provides the solution architecture that supports the desired corporate strategic and operational objectives.

The contractor shall describe the linkage between the current and planned enterprise business strategy including internal and external influences and the overarching requirements that the IT organization must meet to satisfy that strategy.

Pursuant to Navy ERP requirements, the contractor shall define the business strategic context on which the future-state ("To-Be") Enterprise Architecture is built. The contractor shall capture the following business elements: environmental trends, risk, strategies and business processes, related activities and IT functions to support the ONR corporate strategic plan, vision and objectives.

The contractor shall describe the "As-Is and "To-Be" state of the ONR enterprise architecture in an analytical framework. At a minimum, the elements of the EAPI report shall include the following:

2.3.1.1 Vision - The contractor shall present the COESG's corporate vision in two formats, a written report and a graphic representation. The written report shall be in the Department of Defense All View (AV-1 & AV-2) format; the graphic representation shall be a DoDAF Operational View (OV-1).

2.3.1.2 – Defining Architectural Scope: The contractor shall work with the enterprise architect and COESG to define the architectural scope of the EA framework (both the "As-Is and To-Be").

2.3.1.3 Environmental Cultural Trends — This section (AV-1.2) shall describe the environmental trends (changes in the internal and external factors) which the Executive Steering Group perceives as impacting ONR 's EA planning and implementation. These factors can include industry, economic, demographic and regulatory changes, as well as technologies that are impacting organizational strategies. Each environmental cultural trend shall be prioritized and the impact of the trend on ONR shall be noted.

2.3.1.4 Enterprise Business Strategies — This section (AV-1,2) shall contain the enterprise strategies in response to the identified trends. The strategies should describe the most important themes that give coherence and direction to the organization's ability to respond to the environmental trends. The strategies should communicate the intent of the ONR organization or present a target as to where ONR wants to be operationally in the future. Each enterprise business strategy shall be prioritized.

2.3.1.5 Environmental Trends/Enterprise Business Strategies Matrix — This section shall contain matrices using the DoDAF System view model (SV – 1, 3, 4, 5, 6, 7, 8, 9) where applicable. These matrices capture the relationship between the environmental trends and business strategies by using a color scheme describing the strength of the relationship. Positive relationships, for example, shall be identified as green for high; those that are not related shall be identified as red for low; and those that are loosely related shall be identified as yellow for medium

2.3.1.6 Business Information Requirements — This section shall describe the business process and information requirements in support of the enterprise business strategies for the "As-Is" and "To-Be" architectures. The requirements and business processes shall be written at a high-level, describing "what information moves from whom to whom, over time and/or distance." The requirements shall also be numbered in regard to priority, and should answer the following questions relative to supporting the enterprise business strategies:

- ♦ What information is required?
- ♦ Who needs the information?
- ♦ When and how often do they need the information?
- ♦ Where does the information come from?

In addition, the contractor shall answer and display the results above utilizing the Department of Defense Architecture Framework (DoDAF) models, version 1.0 or later, Operational Views (OV-2, 3, 4, 5, 6a, 6b, 6c, 7) where applicable. OV – 5 system views will be displayed utilizing Power Point, Visio, IDEF0, etc. or UML per approval of government program officer.

2.3.1.7 Enterprise Business Strategies/Business Information Requirements Matrix — Using the same technique in paragraph 2.3.1.4, the contractor shall illustrate the strength of the relationship between these two items using the DoDAF System Views (SV – 1, 3, 4, 5, 6, 7, 8, 9) where applicable for the "As-Is" and "To-Be" architectures.

2.3.1.8 Information Technology Requirements — This section shall describe the necessary capabilities in text, drawings, and DoDAF system views (SV – 1, 3, 4, 5, 6, 7, 8, 9; TV-1, 2) where applicable for the "As-Is" and "To-Be" architectures. to enable the business information requirements. The IT requirements shall state the architecture's ability to:

- ♦ Provide the information that is needed to satisfy the business information requirements.
- ♦ Enable the applications that are needed to satisfy the business information requirements.
- ♦ Provide the infrastructure that is needed to satisfy the business information requirements.

2.3.1.9 Business Information Requirements/IT Requirements Matrix — Using the same technique in paragraphs 2.3.1.4, the contractor shall illustrate the strength of the relationship between these two items.

2.3.10 – EA Development Methodology and Tool Support

The contractor shall develop and document the methodology/procedures required for a successful EA implementation at ONR pursuant to cultural, fiscal, technical and other defined critical success factors. Identification, methodology, and utility of computer resources and other tools required for a successful EA framework at ONR.

2.3.1.1 – EA Models/Artifacts

The contractor shall define, create and develop all models required under this effort

2.3.1.2 – EA Governance

The contractor shall recommended EA governance management (EA framework configuration management) for the ONR enterprise.

2.3.1.3 – EA Project and Program Management

The contractor shall provide project and program management support for this effort which includes, organization, roles, schedules, and funding assessment required for successful EA planning.

2.3.1.4 – Alignment of the EA to CPIC at ONR

The contractor shall describe how IT capital planning at ONR will be aligned to the EA framework.

2.3.1,5 – EA Team Training and Education Requirements

The contractor shall provide education and training required for ONR staff to plan, implement and sustain an EA at ONR.

2.3.2 ERP Gap Fit Analysis

The contractor shall conduct an ERP gap fit analysis. While conducting this analysis, the contractor shall consider the following:

- ♦ communicating legacy system sunset plans,
- ♦ legacy system data conversion planning and execution,
- ♦ data cleansing and data preparation,
- ♦ cutover planning,
- ♦ Assisting the government in command communications role mapping (permissions and authorization assignments within Navy ERP),
- ♦ end user training,
- ♦ deployment – site implementation teams,
- ♦ over the shoulder knowledge transfer,
- ♦ defining the “As-Is ONR enterprise architecture and its targeted enterprise architecture pursuant to Navy ERP,
- ♦ governance/sustenance - business office (requirements management, analytical reporting and functional support over and above the help-desk)
- ♦ ERP Cut-over Test Plan and Procedures

2.4 Reports Data and Other Deliverables

The contractor shall submit the following deliverables to the designated Program Officer. All deliverables shall be submitted either electronically and/or hardcopy, as directed by Program Officer/COR, unless otherwise noted.

- Program Plan – The Program Plan is due 7 calendar days after task order award. The detailed CV and gap-fit analysis program plan should include (but not limited to) scheduling, tasking, objectives, strategy, risk management, man-power loading scheme/schedule and deployment. The government shall have 7 days to review/approve the program plan.
- Briefings/Minutes - Weekly project meetings, executive briefing (materials, slides, etc.) and minutes via email to the Program Officer/COR.
- Progress/Status Reports - Monthly Progress/Status Reports are due no later than the 15th of each month. These reports shall provide a summary of the action performed that month along with the expenditures for that month by labor category and accumulative expenditures to date.
- Earned Value (EV) Reports - Monthly EV reports in the standard industry format.
- EA Planning and Implementation Report (EAPI) in DoDAF All View (AV-1 & 2), OV-1, 2 and SV Matrix Format – The draft EA Planning and Implementation (EAPI) in AV-1 & 2 format and OV-1 & 2 graphic is due 90 days after task order award. The final EAPI in AV-1 & 2 format and OV-1 & 2 graphic is due 100 days after task order award. The AV – 1 shall define the ONR enterprise targeted (to – be) architecture derived from collaboration with ONR's executives. The AV – 1 shall also include the following: (1) all favorable and unfavorable cultural characteristics that may effect the implementation of the defined vision and supporting enterprise architecture; (2) the scope of the ONR enterprise architecture, and identification of all participating organizational units – all areas that need to share substantial information; and (3) a statement of objectives citing what the vision and supporting enterprise architecture will accomplish. Moreover, the report shall include planning and implementation schedules, personnel loading, cost, computer and software resources and all applicable DoDAF artifacts/views as required and cited in Sections 2.3.14 and 2.3.1.6. The government shall have 15 days to approve the report.
- ERP Gap Fit Analysis Report - The draft gap fit analysis Report is due 11 months after award task order award. The final gap fit analysis Report is due 12 months after task order award. The written gap fit analysis reports shall identify the following: (1) all ONR business functions that can readily be accomplished with Navy ERP capabilities, including those functions that can be accomplished with minor modifications to Navy ERP capabilities; and (2) those functions that require major modification or require generation of new capability for Navy ERP.
- Technical Data - All design documentation, business process and data models relative to the base effort are due no later than the completion of the base period. If there are updates/supplements, the contractor shall provide the updates/supplements to the technical data no later than the completion of the base period.
- DoDAF Models - Provide all DoDAF models (per DoDAF version 1.0 or later) required in sections 2.3.1.1 – 2.3.1.8 and an overall corporate business model in IDEF0 or Universal Modeling language (UML) is due no later than 80 days after task order award. If there are updates/supplements, the contractor shall provide the updates/supplements to the government no later than the completion of the base period.
- ERP Cut-over Test Plan and Procedures: - Draft due 10 months after task order award; Final due 11 months after task order award. Contractor format is acceptable with the Government's approval.

3.0 OPTION I STATEMENT OF WORK (ERP IMPLEMENTATION)

3.1 Objective:

Pursuant to the gap fit analysis findings and government review of same, the contractor shall conduct ERP implementation at ONR to meet all Navy ERP requirements.

3.2 Scope:

The contractor's ERP implementation shall encompass all Navy requirements as specified.

3.3 Tasks/Requirements:

During the ERP implementation stage, the contractor shall perform the following tasks:

- 3.3.1 Support legacy application shutdown planning to help the customers in knowing how to transfer the data to Navy ERP. The Contractor shall provide functional knowledge of Navy ERP so that questions can be answered such as (but not limited to) how to move data from one system to the next and how ONR can report business metrics from the new system like they did from the legacy system.
- 3.3.2 Provide Navy ERP functional insight into ONR's Business Processes to assist with data cleansing and preparation activities.
- 3.3.3 Work with Navy ERP to build a cutover plan for ONR that outlines the following: how the required data will be transferred from legacy systems or manual inputs; in what sequence (building in dependencies on data loads); using what validation routines; and when the events will occur.
- 3.3.4 Assist ONR with interpreting the roles and assignments (permissions/access) available from Navy ERP to understand what roles each person within ONR requires to continue to perform their duties after implementation.
- 3.3.5 Attend Navy ERP Train the Trainer activities to in turn train the ONR workforce on Navy ERP.
- 3.3.6 Provide a Navy ERP Training Logistics Coordinator responsible for working with the ONR staff to accomplish the following: securing classroom space to satisfy the training requirement; scheduling the instructor led classes; enrolling students in those classes; scheduling instructors; monitoring attendance; ensuring the classrooms are ready on a daily basis; and reporting metrics on how well the information is received by the student.
- 3.3.7 Assist ONR in planning and performing customer support taskings such as command communications, Navy ERP Kickoff meetings, leadership summits, road show events and other change management activities with Navy ERP.
- 3.3.8 Support the efforts of identifying all the persons within ONR who will need to use Navy ERP, ensure background checks, CAC card issuance, annual information assurance training and non-disclosures are completed and tracked.
- 3.3.9 Act as liaison with Navy Marine Corps Internet (NMCI) to ensure ONR desktop has the proper configuration for accessing Navy ERP (to include Citrix Remote Access software, PKI certification).

- 3.3.10 Provide implementation teams to complement the Navy ERP global implementation teams who will be providing guidance to the users on how to transition to performing their duties under Navy ERP at ONR headquarters and field site locations.
- 3.3.11 Provide services to support site implementation team(s) stand up approximately 4 months prior to initial operating capability (IOC) and remain onsite with the users up to 3 months after IOC. These teams will be the support arm for ONR users throughout implementation and IOC. The team make-ups will consist of functional advisors, data conversion advisors, and training logistics personnel who will assist in the execution of the plan for implementation and IOC.
- 3.3.12 Assist ONR in standing up the business office function responsible for sustenance of Navy ERP at ONR. It is anticipated that duties like requirements management, analytical reporting and functional support will be provided through the Business Office.
- 3.3.13 Support ONR in driving organizational transformation through direct support, analysis and feedback to Command Transition Activities by:
- ♦ Maintaining and updating the Transition Strategy/Plans.
 - ♦ Providing status reports on transition activities.
 - ♦ Continuing to build the business case for what activities should transition and when supporting team leads and subject matter experts (SMEs) with documenting transition plans.
 - ♦ Assisting with the coordination of transition activities.
 - ♦ Assisting with the orchestration of command buy-in.
 - ♦ Assisting with the facilitating execution of approved transition plans.
 - ♦ Building a strong working relationship and acting as a liaison with the Navy ERP Help desk to enable timely response to customer issues for IOC.
- 3.3.14 Provide project and program management support for this effort which includes, organization, roles, schedules, and funding assessment required for successful EA implementation.

3.4 Reports Data and Other Deliverables

The contractor shall submit the following deliverables to the designated Program Officer. All deliverables shall be submitted either electronically and/or hardcopy, as directed by Program Officer/COR, unless otherwise noted.

- ♦ Briefings/Minutes - Weekly project meetings, executive briefing (materials, slides, etc.) and minutes pursuant to ERP transition planning and implementation via email to the Program Officer/COR.
- ♦ Progress/Status Reports - Monthly Progress/Status Reports pursuant to ERP training, transition planning and implementation are due no later than the 15th of each month. These reports shall provide a summary of the action performed that month along with the expenditures for that month by labor category and accumulative expenditures to date.
- ♦ Earned Value (EV) Reports - Monthly EV reports in the standard industry format.
- ♦ Technical Data & Updates – All design documentation, business process and data models, (including updates to the transition Strategy/Plans) is as required, but no later than the completion of Option I. If there are updates/supplements, the contractor shall provide the updates/supplements to the technical data as required, but no later than the completion of Option I.

- ♦ Training Materials: The contractor shall provide a copy of the training materials as required.

4.0 OPTION PERIOD II STATEMENT OF WORK (ERP SUSTENANCE)

4.1 Objective

The contractor shall continue to support the implementation of Navy ERP.

4.2 Scope

The contractor shall provide program management and execution support, including participation in leadership meetings and being an active member of the leadership team, focusing resources to resolve critical tasks, conducting regular discussions with ONR's customers and preparing and delivering monthly status reports which include critical issues requiring ONR's management attention.

4.3 Technical Tasks/Requirements

The contractor shall provide the following support during Segment 3 – Governance/Sustenance

- 4.3.1 Program Management and Program Execution Support.
- 4.3.2 Support ONR via the implementation teams in maintaining direct interface/support channels to customers.
- 4.3.3 Support ONR team members in communication, training, help desk, role management, customer interface, continuous improvement/metrics, and user group activities as required.
- 4.3.4 Conduct onsite training for ONR employees to provide the knowledge needed to perform their duties using the new Navy ERP toolset.
- 4.3.5 Provide advanced training through workshops and instructor led training events.
- 4.3.6 Support Business Data Warehousing and Analytical, possible components or features of business intelligence reporting to include Activity Based costing to generate, interpret, and present command wide metrics demonstrating the health of ONR
- 4.3.7 Support knowledge transfer and documentation for ONR ERP users necessary for reporting, query, and functional verifications in regard to ONR databases, and ERP capabilities
- 4.3.8 Support data reconciliation activities and communicate root cause analysis and solutions to the appropriate Government Team Lead(s).
- 4.3.9 Support daily operation activities including but not limited to the following:
 - 4.3.9.1 Research production issues involving configuration, interfaces, reports and enhancements, and support the development and implementations of approved changes through the Navy ERP process.
 - 4.3.9.2 Assist in monitoring/reviewing roles and authorizations to ensure the customers are receiving the access they need to perform their

job duties (and reviewing roles to ensure that the customers are not receiving access to data or transactions that are not necessary for that user population).

- 4.3.9.3 Attend regular team meetings to identify and support resolution of configuration issues.
- 4.3.9.4 Complement the standard Navy ERP Help Desk in responding to Help Desk inquiries relevant to Navy ERP. The contractor will provide the first line of defense to the ONR users in assisting them through problem resolution onsite. This includes supporting the feedback to Navy ERP for development of training material for frequent and reoccurring help desk issues.
- 4.3.9.5 Serve as the primary customer advocate for the ONR ERP tool. As requested, the contractor shall support ONR ERP in patch upgrade testing and functional testing of new functionality.
- 4.3.9.6 Provide enterprise architecture support (scoping, modeling, etc.) relevant to ERP sustenance.

4.3.10 Provide project and program management support for this effort which includes, organization, roles, schedules, and funding assessment required for successful EA sustenance.

4.4 Reports Data and Other Deliverables

The contractor shall submit the following deliverables to the designated Program Officer. All deliverables shall be submitted either electronically and/or hardcopy, as directed by Program Officer/COR, unless otherwise noted.

- Briefings/Minutes - Weekly project meetings and executive briefing (materials, slides, etc.) and minutes via email to the Program Officer/COR.
- Progress/Status Reports - Monthly Progress/Status Reports are no later than the 15th of each month. These reports shall provide a summary of the action performed that month along with the expenditures for that month by labor category and accumulative expenditures to date.
- Earned Value (EV) Reports - Monthly EV reports in the standard industry format.
- DoDAF Models and associating technical data - Provide new or modified DoDAF models (per DoDAF version 1.0 or later) as required. If there are additional DoDAF updates/supplements, the contractor shall provide the updates/supplements to the government as required, but no later than the completion of the Option II. If there are any updates to the technical data, the contractor shall provide the updates as required, but no later than the completion of Option II.
- Training Materials: The contractor shall provide a copy of the training materials as required.
- Final Report - The final report shall include training metrics such as number of users trained per week, etc., sustenance plans and objectives, scope of effort, training and ERP help desk call management procedures, system maintenance recommendations, etc. – draft due 5 months after the effective date of Option II; final report due upon completion of Option II.

5.0 Personnel Requirements

The contractor shall provide qualified personnel to manage and execute all aspects of the statement of work. The following skill sets are anticipated to support the tasks:

- 5.1.1 All personnel must be thoroughly familiar and proficient in the use of commercial software packages such as Microsoft Word, Project, Excel and PowerPoint.
- 5.1.2 Candidates should have excellent technical writing skills, the ability to effectively analyze and model complex business systems, and to facilitate executive consensus building in regard to strategic plans, objectives and resultant vision formulation. The candidate must be able to effectively communicate in writing and orally.
- 5.1.3 Enterprise Architect or Equivalent: At least a master's degree from an accredited college or university and 7 years of experience in enterprise architecture, systems engineering, system analysis or have certification as an enterprise architect from a regional accredited institution of higher learning. The candidate should have excellent skills in system's analysis. Candidate should have demonstrated competence in business modeling and in the Department of Defense Architecture Framework (DODAF), Federal Enterprise Architecture Framework (FEAF), Treasury Enterprise Architecture Framework (TEAF), Zachman or related Architecture Frameworks.
- 5.1.3 Senior Systems Analyst or Equivalent: At least a bachelor's degree from an accredited college or university and 5 years of experience in enterprise architecture, systems engineering or system analysis or have certification as an enterprise architect from a regional accredited institution of higher learning. The candidate should have excellent skills in system's analysis with at least 5 years of domain knowledge (HR, Finance, logistics etc) followed by extensive Navy ERP analysis and implementation experience with at least a couple of real-world ERP implementations. Candidate should have demonstrated competence in business modeling and in the Department of Defense Architecture Framework (DODAF), Federal Enterprise Architecture Framework (FEAF), Treasury Enterprise Architecture Framework (TEAF), Zachman or related Architecture Frameworks.
- 5.1.4 Systems Analyst or Equivalent: At least a bachelor's degree from an accredited college or university and 3 years of experience in enterprise architecture, systems engineering or system analysis or have certification as an enterprise architect from a regional accredited institution of higher learning. The candidate should have excellent skills in system's analysis. Candidate should have demonstrated competence in business modeling and in the Department of Defense Architecture Framework (DODAF), Federal Enterprise Architecture Framework (FEAF), Treasury Enterprise Architecture Framework (TEAF), Zachman or related Architecture Frameworks.
- 5.1.5 Senior ERP Trainer or Equivalent: At least a bachelor's, preferably a master's degree in computer science, information systems, business, systems engineering, finance, logistics or equivalent from a regionally accredited university or college with at least 5 years of domain knowledge (HR, Finance, logistics etc) followed by extensive software training and implementation experience with at least a couple of real-world ERP implementations. The candidate must possess prior ERP training experience. The candidate must be able to effectively communicate in writing and orally.
- 5.1.6 ERP Trainer or Equivalent: At least a bachelor's, degree in computer science, information systems, business, systems engineering, finance, logistics or equivalent from a regionally accredited university or college with at least 3 years of domain knowledge (HR, Finance, logistics etc) followed by extensive software and ERP training. The candidate must be able to effectively communicate in writing and orally.

6.0 Level of Effort

- 6.2.1 The level of effort has been estimated for the proposed contract. A 12 month base, 8 month Option I, and 6 month Option II have been defined. Total potential period of performance, with options, is 26 months)
- 6.2.2 The period of performance for the Base will be from time of award through 12 months. The level of effort anticipated for this period is approximately 0.96 man-years at an average rate of approximately 274.8 hours per month. A summary of the labor categories and the total anticipated annual hours for this effort is estimated below in paragraph 6.2.5
- 6.2.3 The period of performance for Option I will be from time of award through 8 months. The level of effort anticipated for this period is approximately 1.33 man-years at an average rate of approximately 220.1 hours per month. A summary of the labor categories and the total anticipated annual hours for this effort is estimated below in paragraph 6.2.5
- 6.2.4 The period of performance for Option II will be from time of award through 6 months. The level of effort anticipated for this period is approximately 0.83 man-years at an average rate of approximately 255 per month. A summary of the labor categories and the total anticipated annual hours for this effort is estimated below in paragraph 6.2.5
- 6.2.5 Estimated Level of Effort Chart for Defined Periods

Labor Category	Base	Option I	Option II
Enterprise Architect (1 @ 12 mos)	692		
Senior Systems Analyst (1 @ 12 mos)	766		
Systems Analyst (1 @ 12 mos)	1840		
Senior Systems Analyst (1 @ 6 mos)		612	
ERP Trainer (1 @ 5 mos)		690	
Senior ERP Trainer (1 @ 3 mos)		459	
Enterprise Architect (1 @ 2 mo)			306
ERP Trainer (1 @ 4 Mo.)			612
Senior ERP Analyst (1 @ 4 mo.)			612
Total Hours	3298	1761	1530

NOTE: 1840 hours is equivalent to one (1) man-year

- 6.2.6 The above labor categories and hours are provided as the Government's best estimate of the work to be performed. The offeror may propose the same level of effort (hours and labor categories) or a different level of effort based on its own labor classification system and unique approach to satisfy the Government's requirement.
- 6.2.7 While the Government will consider an alternate level of effort, it is the Government's preference to maximize the estimated labor hours devoted to the direct performance of the technical tasks. To the extent that the level of effort proposed is different than the Government's estimate, the offeror's technical proposal should clearly specify the hours and labor categories proposed for each task in the statement of work.

7.0 Order Details

7.1 Contract Type: The Navy anticipates awarding a cost plus fixed fee level of effort task order.

7.2 Period of Performance: Base period of 12 months from time of award with Option I for 8 months and Option II for 6 months.

7.3 Other Direct Costs (ODCs)

ODCs (including supplies, travel, etc.) will be reimbursed at cost plus G&A without profit or fee. Purchases of items (other than consumable materials or supplies) exceeding \$2,500 and all travel must be approved in advance by the Contracting Officer's Representative (COR). The total ODC amount is not to exceed (NTE) including G&A \$10,000 for the base period and \$2,300 for each option period. At this time, the specific items cannot be identified; however, the ODC total cannot exceed the NTE amount stated in this section.

This NTE amount should be proposed and included as part of the cost total (without profit or fee) in every proposal submitted under this solicitation.

Travel may or may not be required to support this Statement of Work. In accordance with the contract requirements, direct costs associated with the Contractor's travel, including per diem, shall not exceed the applicable rates found in the Federal Travel Regulation (FTR) and/or the Joint Travel Regulations (JTR). All travel arrangements under the Contractor's responsibility include: clearance requests, hotel accommodations, travel orders, and visa/passport requirements, unless otherwise stated by the Government sponsor.

7.4 Place of Performance: It is anticipated that 20% of the work will be performed at the contractor's site, while the remaining 80% will be performed at ONR.

7.4.1 Government Furnished Resources (GFR): The Government will provide information, material and forms unique to the Government for supporting the task. The Government furnished resources necessary to perform the statement of work should be identified and requested through the designated Contracting Officer's Representative (COR).

7.4.2 Facilities, Supplies and Services: The facilities required to perform the tasks outlined in the Statement of Work will be at the Contractor's place of business and at ONR. Basic facilities such as work space and its associated operating requirements (i.e., phones, desks, and utilities) will be provided while working in Government facilities. The availability of any required computer resources while working in Government facilities should be verified in advance with the designated Contracting Officer's Representative (COR).

7.4.3 Information: All Government unique information related to this requirement necessary for Contractor performance will be made available to the Contractor. The Contracting Officer's Representative (COR) will be the point of contact for identification of any required information to be supplied by the Government.

7.4.4 Documentation: All existing documentation relevant to this task's accomplishment will be made available to the Contractor at the beginning of the task. The Contractor will be required to prepare documentation in accordance with defined guidelines provided by the Government.

7.4.5 Equipment: With the exception to the basic facility items noted Subsection 7.4.2 and in accordance with the general guidance in FAR Part 45.102, Contractors are required to furnish all property necessary to perform on Government contracts or orders. PC's should not be proposed as a direct charge under this solicitation.

8.0 Subcontracts/Consultants:

(a) Contractor may request or propose, on a case-by-case basis, subcontract/consultant support for specific technical tasks.

(b) The prime offeror shall not propose any more than 1.0% of fixed fee on the subcontractor amount that is included in the proposal.

9.0 Security Requirements:

(a) **Clearance Requirements.** During the performance of the effort, the Contractor may be required to have access to, and may be required to receive, generate, and store information classified to the level of SECRET. For personnel, a minimum of a SECRET clearance is required. Any Contractor facilities used in support of this contract must be granted SECRET facility clearances and have the capability to store material classified up to and including SECRET. A DD Form 254 will be required prior to access or production of any classified information. Additionally, Contractor is required to safeguard the information labeled as proprietary.

(b) **Privacy Act.** All Contractor personnel assigned to this task will have access to information that may be subject to the Privacy Act of 1974. The Contractor is required to ensure the proper safeguarding of such information to prevent unauthorized release.

(c) **Nondisclosure Agreement.** In the course of its work, each employee of the selected Contractor will be required to execute a Nondisclosure Agreement (NDA) as outlined in Section 11.2 of this solicitation.

10.0 Organizational Conflict of Interest

10.1 Safeguarding Information

The parties acknowledge that, during performance of the contract resulting from this Order solicitation, the Contractor may require access to certain proprietary and confidential information (whether in its original or derived form) submitted to or produced by the Government. Such information includes, but is not limited to, business practices, proposals, designs, mission or operation concepts, sketches, management policies, cost and operating expense, technical data and trade secrets, proposed Navy budgetary information, and acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The Contractor shall take appropriate steps not only to safeguard such information, but also to prevent disclosure of such information to any party other than the Government. The Contractor agrees to indoctrinate company personnel who will have access to or custody of the information concerning the nature of the confidential terms under which the Government received such information and shall stress that the information shall not be disclosed to any other party or to Contractor personnel who do not need to know the contents thereof for the performance of the contract. Contractor personnel shall also be informed that they shall not engage in any other action, venture, or employment wherein this information will be used for any purpose by any other party.

10.2 Organizational Restrictions

Support contractor's knowledge of competition sensitive information, described in paragraph above, may unfairly affect its competitive position in future ONR research solicitations. The Contractor understands that, during performance of the contract resulting from this Order solicitation and for a period of up to two years after the completion of its performance of the contract, the Contractor, any affiliate of the Contractor, any joint venture involving the Contractor, any entity into or with which the Contractor may merge or affiliate, or any other successor or assign of the Contractor may not be eligible to participate as a prime Contractor, subcontractor, consultant, joint venture, partner, or other agreements directly impacted by the work stated under this solicitation.

11.0 Proposal Requirements

11.1 Proposal Format: The Offeror's proposal must be divided into two sections: (1) Technical Proposal, and (2) Cost Proposal. Information for the technical portion shall be a separate document from the cost proposal. No cost information should be included in the technical section. The length of the technical proposal shall not exceed ten (10) pages, exclusive of resumes. There are no page limits on the number of resumes or the pages of the cost proposal. The proposal should be written and organized to be compatible with the Statement of Work, company's organization and accounting structure, and proposed cost.

(a) Technical Proposal: The technical proposal should include the following: The Offeror's understanding of and approach to the requirement, resumes of proposed personnel, and the amount of proposed hours for personnel. The Offeror should describe specifically how the work activities required to complete the tasks in the statement of work will be done. The Offeror should explain how technical objectives, tasks and deadlines will be determined; how staff responsibilities will be assigned; whether and to what degree consultants and/or subcontractors will be utilized; how the quality and timeliness of work performance will be supervised and controlled; how the Offeror will coordinate with the program office; how a surge capacity will be maintained to meet unanticipated requirements; and how administrative tasks such as travel, security and resource requests will be handled.

The Offeror should include information relative to previous efforts for the same or similar services provided in the past to include contract numbers and Government points of contact where applicable.

The Offeror should explain what corporate facilities are available and would be used in support of the work including computer resources, publication/media materials and equipment where appropriate. The proposal should acknowledge that the Contractor will provide the appropriate IT/telecommunications equipment for the proposed personnel for this task order.

(b) Cost Proposal: The Offeror should submit a cost proposal that itemizes the following proposed costs (as applicable): direct labor (including each labor category with associated proposed hours and hourly rate), fringe benefits, labor overhead, consultants, subcontracts, subcontractor/consultant handling charges, G&A, cost of money, fixed fee and any other relevant cost categories. The Offeror should also include the estimated Travel and ODC amounts set forth in the "Other Direct Costs" section of the solicitation as part of its proposed costs. The base calculation and rates must be provided for all indirect cost items. Subcontract cost information containing the same type of details described above for the prime must be provided either with the prime's proposal or in accordance with section 11.3 of this solicitation before the solicitation due date and time.

If available and applicable, the Contractor should also provide its Defense Contract Audit Agency (DCAA) point of contact, including the Branch Office name, auditor name, phone number and e-mail address.

11.2 Other Required Documents: Offerors should be aware that, upon receiving an award, the following additional documentation will be required:

11.2.1 Non-Disclosure Agreement: Each employee of the successful Offeror will be required to sign a Non-Disclosure Agreement (NDA) prior to commencing work under this Order. The supervisor/manager of the proposed personnel will also be required to sign the NDA on behalf of the Contractor. Attachment A is the NDA that shall be used at the commencement of this order.

11.3 Proposal Submission: The due date for receipt of proposals for this solicitation is no later than 2:00 PM (Local Time) on 14 February 2007. All proposals must be uploaded electronically via the "[Upload Proposals](#)" hyperlink, which is under the hyperlink for this solicitation on ONR's

MATOC website. (Note: this site restricts the formats of uploaded documents to those in MS Word, MS Excel, or PDF.)

12.0 Evaluation Information

12.1 Evaluation Criteria: A Task Order will be awarded to the responsible offeror whose offer represents the best value to the Government. In order to determine which offeror represents the best overall value, offers for individual task orders will be evaluated on the following Technical and Price/Cost Factors:

Technical Factors

- (1) Proposed personnel
- (2) Management Plan and Technical Approach
- (3) Past performance on earlier tasks under this and similar contracts
- (4) Corporate Facilities

Price/Cost Factors

- (5) Cost

The Government will make a determination of the overall value of each proposal in terms of its potential to best satisfy the needs of the Government, considering both Technical and Cost Factors.

The Offeror's technical capability (as measured by the Technical Factors) and Cost Factor are equal in importance. In regards to the stated Technical Factors, Technical Factor 1 is of the greatest weight; Technical Factors 2 through 3 are equally weighted. Technical Factor 4 is of less value than all other Technical Factors.

In evaluating past performance on individual orders, the procedural requirements in FAR 42.15 are not mandatory. Past performance will be based on the Government's subjective evaluation of the Contractor's performance with previous orders, if any, under this contract and similar contracts.

13.0 Award: The Government will award a task order to the responsible Offeror whose offer conforming to the solicitation will be most advantageous to the Government, cost and other factors considered. The anticipated award and start date of this Order is on or about 16 April 2007.

14.0 Submission of Questions: Any questions regarding this solicitation must be provided in writing to the Point of Contact listed below. Acceptable forms of written question submission include fax and e-mail. Questions submitted less than 72 hours prior to the closing date for proposals may not be answered and the due date for submission of proposals may not be extended.

15.0 Solicitation Amendments: Any amendments to this solicitation will be posted along with the solicitation on the ONR website. It is the Offeror's responsibility to regularly check for any postings of solicitations, amendments, and questions and answers under this or any other MATOC Solicitation.

16.0 Point of Contact: The Points of Contact for this solicitation are below

Primary Point of Contact

Lynn Christian

Email: christl@onr.navy.mil

Secondary Point of Contact

Vera M. Carroll, Branch Head

Email: carrolv@onr.navy.mil

**Non-Disclosure Agreement Regarding Contractor Support
for the Office of Naval Research**

The undersigned individual, _____, agrees, both in his personal capacity and as an employee of _____ as follows:

BACKGROUND

1. The mission of the Office of Naval Research is to plan, foster, and encourage scientific research and technology development in recognition of their paramount importance in the maintenance of future naval power and the preservation of national security. ONR provides for the continuing technological superiority of U.S. naval forces, by providing the Department of the Navy (DoN) with mission-relevant, affordable new capabilities that create and exploit scientific breakthroughs, respond to fleet requirements, and support strategic U.S. industries. ONR requires contractor technical services and research support in order to meet these requirements. The services/support that may be provided to ONR by contractor personnel include but are not limited to the following:
 - i. Assist ONR personnel in overall technical program management support on matters and issues consistent with ONR sponsored development projects, including assisting in the evaluation of white papers, proposals, program/project planning, investment reviews, technology assessments, data analyses, conference and seminar activities, and financial issues.
 - ii. Provide support in the financial execution of ONR programs. Monitor availability and use of funds. Review financial documents and plans for impact on program objectives and requirements. Prepare internal financial notices, instructions, guidelines and reports. Conduct analyses and provide reports that identify, quantify and evaluate financial execution of accounts and accomplishment of program goals and milestones. Coordinate preparation and review of actual and projected funding estimates, justifications and strategies. Identify deficiencies, excesses, trends and imbalances to assure funds availability. Work with program personnel to expedite financial execution and ensure programmatic benchmarks are met.
 - iii. Draft analyses, presentations, notes, assessments, testimonies, speeches, and other materials on various technical/management topics, as requested, for use by ONR personnel with other internal ONR departments and externally with the Navy staff, Department of Defense, other federal and state agencies and the U.S. Congress.
 - iv. Provide assistance in the areas of information technology to include database design and maintenance, software development, graphics and reproduction, and other allowable materials and services.
 - v. Provide administrative and management support in the execution of ONR programs to include the preparation of official documents and files for execution by Government employees.
 - vi. Provide support on technical, programmatic and operational matters pertaining to the diverse array of technologies investigated and supported by ONR.
2. The undersigned individual is serving as contractor support for ONR. As such, he has and will continue to come into contact with proprietary technical and commercial information. He likewise will have access to sensitive internal information developed by or on behalf of the Government in connection with the accomplishment of ONR's mission.

AGREEMENT

1. The undersigned individual agrees that he will not disclose to any individual, company, or Government Representative¹ any information² relating to current or proposed Navy budgetary information, acquisition planning or acquisition actions, obtained either directly or indirectly as a result of the effort performed on behalf of ONR. The undersigned individual agrees that he will promptly notify the ONR Office of Counsel of any attempt by an individual (including any contractor personnel), company or Government Representative to gain unauthorized access to such information, and of any disclosure of such information to unauthorized parties. Such notification shall include the name and organization, if available, of the individual, company or Government Representative seeking access to such information.
2. The undersigned and his employer acknowledge that the owner of any proprietary information improperly disclosed stands as an intended third-party beneficiary of this non-disclosure agreement. In the event of an unauthorized disclosure of proprietary information, the owner of the information may seek legal recovery under this non-disclosure agreement, even though the information owner is not a formal party to the agreement.

FOR THESE REASONS the undersigned individual agrees on his own behalf, and his employer likewise concurs, to protect, respect and not disclose the proprietary information and Government mission- and procurement-sensitive information that may come to their attention as part of the contract assistance provided to ONR.

Employee Signature _____

Printed Name _____

Date _____

Concurrence by the employer:

Supervisor/Manager Signature _____

Printed Name _____

Date _____

¹ Government Representative is defined as any Government employee, either military or civilian, not assigned to the activity or program office for which the effort is being performed.

² This information includes, but is not limited to, contractor proposals, proprietary data and commercial information, reports and other information in the Government's possession, including information contained in contracts/grants/agreements and associated records and files